



The AEP® Council Nomination Program for the Central Arizona Estate Planning Council

Professional estate planners can achieve an accreditation that acknowledges their experience and specialization in estate planning. **Simply put, the Accredited Estate Planner® designation means “I believe in the team concept of estate planning.”**

The designation is awarded by the NAEPC, of which the **Central Arizona Estate Planning Council** is a member chapter, to recognized estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character. The AEP® designation helps both clients and colleagues understand your belief in, and dedication to, the team concept of estate planning.

In 2004, the NAEPC board created the council nomination program in recognition of the fact that council leaders are in a unique position to know who in your councils deserve the honor of being nominated for the AEP® designation. We, therefore, encourage your council to participate in this special program which not only benefits the nominated candidates but the councils as well. **The council nomination process offers the candidate a more streamlined application process with a reduced application fee. At the same time, the council benefits from the fact that membership in the council is required in order to maintain the designation in active status and good standing.**

As an affiliated council with more than 100 members, Central Arizona is entitled to nominate 2 qualified candidates in each of the 5 disciplines that we recognize – accounting, insurance/financial planning, legal, philanthropic, and trust – plus 2 additional in any of the 5, for a total of 12 on an annual, calendar year basis. **This program has been successfully implemented by approximately 130 affiliated local estate planning councils since its inception. Make sure to check out the stipend program where national will reimburse the council for event expenses up to \$500 when you host an information session about the designation program!**

The **Central Arizona Estate Planning Council** has participated in the council nomination program beginning in 2006 and of the 25 council members who currently hold the designation in active status, 6 were council nominated

- Mark R. Allen, JD, Board Certified in Estate & Trust Law, AEP® – council nomination 2020
- Ann M. Barber, CFP®, CAP®, MSFS, AEP®
- Linda Henneman Bowers, JD, AEP®, CFP®, CEPA – national nomination 2009
- Cynthia S. Bozik, JD, CAP®, CTFA, AEP®
- Paul R. Burns, CLU®, ChFC®, AEP®, MSFS, RHU, REBC, CEBS, CAP
- Harry C. Calivas, PhD, CFP®, AEP®, ADPA®, CIMA®
- Ashley L. Case, JD, LL.M. (taxation) – council nomination 2021 (pending)
- David A. Cechanowicz, JD, MSFS, EA, CLU®, ChFC®, AEP®
- Bennett E. Conklin, JM, CFP®, ChFC®, CLU®, AEP®
- Thomas G. Georgiou, JD, LL.M. (taxation), AEP® – council nomination 2011
- Robert P. Goodman, CPA, AEP®, CFP®
- Timothy P. Hammond, AEP®, CFP®, CTFA, ChFC®, CLU®, CWS®, MBA
- Kenneth K. Haycraft, CFP®, ChFC®, CLU®, CWS, MBA, MS, CAP, AIF, AEP® – council nomination 2014
- Katie J. Hill, CTFA, AEP® – council nomination 2014

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

1120 CHESTER AVENUE, SUITE 470 CLEVELAND, OH 44114
(866) 226-2224 · NAEPC.ORG



The AEP® Council Nomination Program for the Central Arizona Estate Planning Council

- Erin B. Itkoe, CPA/PFS, CFP®, MST, AEP® – council nomination 2021
- Ronald F. Larson, Atty, AEP®, Certified Estate & Trust Specialist (AZ Bar)
- Katrina C. Lessard, CFP®, AEP®
- Thomas E. Maguire, CPA/PFS, ChFC®, AEP®
- Barry A. McBride, CLU®, AEP®
- John D. Pettee, CFP®, CTFA, AEP®, CAP®
- Brian T. Poe, CFP®, ChFC®, AEP®
- Vladimir Sasic, CFP®, ChFC®, AEP®
- Christopher P. Siegle, JD, LL.M. (taxation), AEP® – council nomination 2021
- Susan K. Smith, Atty, AEP®
- Lisa L. Sullivan, CTFA, CSOP, CWS, AEP®
- Michael Benjamin Welborn, CLU®, ChFC®, CFP®, AEP®

Why should you be interested in earning the AEP® designation?

- Gain a competitive edge and set yourself apart from the competition
- Demonstrate your knowledge, skill, and expertise
- Identify yourself as a qualified member of the estate planning team
- Listing on [national searchable database](#) including discipline and contact information where one can search by state or zip code
- AEP® ALERT – bi-monthly electronic newsletter for designees only with original content provided in the “Technical Corner”; archives are available on the NAEPC website and can be accessed by using national username and password
- Discounted registration fee for [59th Annual NAEPC Advanced Estate Planning Strategies Conference](#) in Fort Lauderdale, FL, from November 15 – 18, 2022
- Deepest discount for the [Robert G. Alexander Webinar Series](#) where designees can earn continuing education credit for the AEP® designation. Programs typically occur on the second Wednesday of every month from 3:00 pm ET to 4:00 pm ET with the exception of November when we host our annual conference. **Special discount for AEP® designees is \$40!**
- Designee-only events offered on a complimentary basis where you can meet and network with fellow designees and share your ideas about member benefits with the national leadership
- Invitation to contribute to the exclusive [AEP® group on LinkedIn](#)

Eligibility Requirements for a Council Nomination

- **Credentials** – Active license or certification as an attorney; accountant; insurance professional & financial planner; philanthropic advisor; or trust officer –holding one or more of the following credentials: JD, CPA, CLU®, CFP®, CFA, ChFC®, CPWA®, CAP® (those applying with CAP® only, must take GS 815 – Advanced Estate Planning through The American College), CSPG, CTFA, MSFS, or MST
- **Experience** – Minimum of 10 years of experience significantly engaged in estate planning devoting at least 1/3 of your professional time to estate planning (If interested members do not have 10 years but have at least 5 years of experience, one can still obtain the designation by meeting additional education requirements, among others, under the self-nomination program described below)

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

1120 CHESTER AVENUE, SUITE 470 CLEVELAND, OH 44114
(866) 226-2224 · NAEPC.ORG



The AEP® Council Nomination Program for the Central Arizona Estate Planning Council

- **Continuing Education** – Earn and maintain a minimum of 30 hours of continuing education, 15 of which must be in estate planning, during the 24 months prior to applying for the designation; every 2 years once awarded the designation
- **Code of Ethics** – sign a declaration statement to continuously abide by the NAEPC Code of Ethics
- **Core Mission** – acknowledge a commitment to the team concept of estate planning

Eligibility Requirements for Self Nomination

- **Credentials** – please see above
- **Experience** – Minimum of 5 years actively engaged in estate planning ; those applicants with less than 15 years or more of experience must take two additional graduate level courses through [The American College of Financial Services](#) or another accredited educational institution
- **Continuing Education** – please see above
- **Professional Reference Requirement** – Three professional references from individuals, each in a unique discipline, and with whom the applicant has worked as part of an estate planning team
- **Code of Ethics** – please see above
- **Core Mission** – please see above

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

1120 CHESTER AVENUE, SUITE 470 CLEVELAND, OH 44114
(866) 226-2224 · NAEPC.ORG